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S&MM cover illustration by Altemus

Cover:
Less than two years ago, The U.S. division of Wilkinson Sword consisted of just two people. Today, the number is closer to 100, including 34 salespeople. The company's decision to quit using reps and build its own sales force was not an easy one. To see how they did it, turn to page 42.

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LETTERS

Missed you

I applaud your special section "The Computer in Sales and Marketing" [S&MM, Dec. 9, 1985]. This timely article addressed many of the issues and problems that sales professionals encounter when trying to automate. Our own research indicates that only a small percentage of people use any type of computer on a daily basis, supporting your three percent figure.

I was surprised and disappointed, however, that our program, called Prospecting, was omitted from your directory. It was one of the first sales and marketing programs on the market for micro-based computers. Prospecting is a comprehensive program that has an application for lead tracking, sales management, and customer follow-up. It is used in direct marketing, sales management, and advertising management. Thank you for allowing us to reassure the thousands that have purchased, or are considering purchasing Prospecting, that we are alive and well at Key Systems.

Charles Brodbeck
Director of marketing
Key Systems
Louisville, KY

I enjoyed your report "Keeping Current with AV Equipment" [S&MM, Jan. 13]. The coverage of the multi-image industry was current and comprehensive, except for one surprising ommission. You failed to mention AVL!

AVL (Audio Visual Laboratories), one of the pioneers in the multi-image industry, was founded in 1970. In 16 years, AVL has grown to become the dominant leader in the industry, with an estimated 60% share of the domestic and international market for multi-image equipment.

Your readers should know that AVL is still going strong!

Marla Suttenberg
Manager of marketing communications
AVL
Tinton Falls, NJ

We welcome the opportunity, Readers Brodbeck and Suttenberg, to let

(continued on page 118)

What's Coming Up

Komatsu in a Cat fight. The world's second largest maker of construction equipment takes on No. 1 Caterpillar in the U.S. with competitive pricing. Apr. 7.

Department store blues. With specialty shops cutting into department store market shares, big-time retailers scurry for solutions. Apr. 7.

S&MM Survey of Industrial & Commercial Buying Power. Our annual volume listing plant locations and shipment totals in both manufacturing and nonmanufacturing industries. Apr. 28.

Correction

The table below, which appeared with the article "How to Pay National Account Managers" in our Jan. 13, edition, was incorrectly labelled. The original headings gave the impression that the first column of dollar figures represented salary through October, and that the second column represented salary for the full year. This version contains the correct headings.

What NAMs earn

Individual 1985 Sales Volume ($Mil) Range	1985 Salary	1985 Salary Plus Projected Incentive Pay	Percent Change 1984–1985 Salary	Percent Change 1984–1985 Salary Plus Incentives
Below 25	$47,100	$57,000	8.0%	13.4%
25–49.9	55,600	62,900	9.7	12.1
50–99.9	68,500	73,900	11.0	12.5
100 and Above	81,200	93,200	1.6	2.8

Computer sales are now forged in Dukker's converted foundry.

merchandise from authorized dealers who want to sell to us. But that accounts for only 25 percent of the company's dollar volume," he says.

The company also has a 12-person technical support staff to test equipment and answer questions from customers. "To be successful, you have to address customer service and technical support," he says.

CHANGING DIRECTIONS

Manufacturing out, marketing in at Berkey

When the sales picture began looking a little fuzzy at 53-year-old Berkey Photo, CEO Jerry Burgdoerfer had a simple solution: change the company's line of business.

Berkey (the "Photo" was dropped late last year) left the manufacturing business for distribution and marketing. The company even sold its photofinishing business, which in 1984 was responsible for more than half of the company's $215.6 million in sales. (Burgdoerfer declined to release 1985's sales figures, which are expected to be about $200 million.)

Berkey divisions had also manufactured photographic, graphic arts, and TV and theatrical lighting equipment.

Why change businesses? Burgdoerfer says the manufacturing concerns tied up capital and were un-

S&MM SALESGRAPH

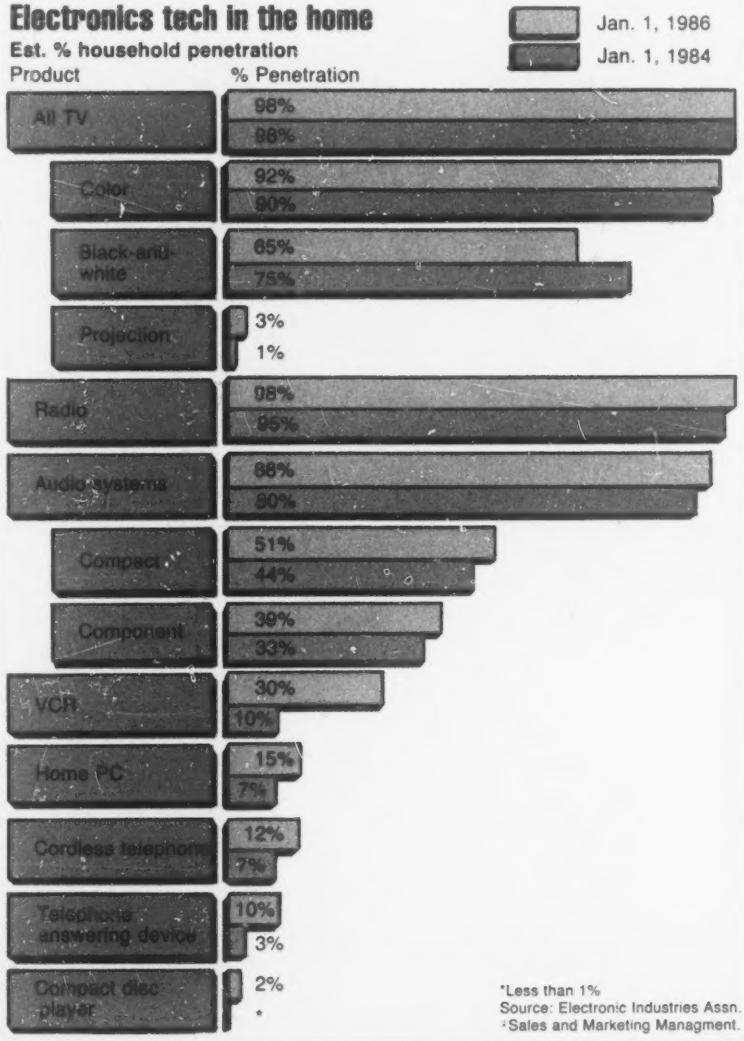
Home is where the hi-tech is

A growing proliferation of electronic gadgetry used for entertainment, information, and education is transforming the household into an electronics warehouse. Spurring the phenomenon, as RCA executive Roy H. Pollack told a recent International Tape Assn. conference, are "Inventions of new products or concepts, improvements of existing products, and reaction to economic, political, or social forces such as the move away from energy-intensive activities."

In the last two years alone, the share of households with a VCR tripled, and the share of those with a PC more than doubled despite last year's computer sales slump. Practically every home, 98%, has a TV, and more than 90% have color sets. The only hi-tech consumer product among the 11 that Electronics Industries Assn. tracks (see graph) that is in relatively fewer homes than two years ago is black-and-white TV.

Electronics tech in the home

Est. % household penetration



*Less than 1%
Source: Electronic Industries Assn.
•Sales and Marketing Managment.

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weaknesses, then we help them to capitalize on their strengths and overcome the weaknesses," says Loftus.

Ace is also encouraging dealers to develop power aisles and dump bins to display their more popular low-priced items. "We want to improve our price value image with the customer and we want those bins where people will trip over them when they walk into the store," says Loftus. For the 30 stores that have already gone with the Store of the Future concept, results have been encouraging, and there are plans in the works, says Loftus, for 100 more remodelings.

Jay Buikema, owner of five Ace stores in the Chicago area, opened a newly remodeled store in November. "It's been a huge success," he

MARKET HIGHLIGHT

New products buck popular social trends

Despite rising costs and the difficulty of pinning down fickle consumer tastes, marketers rolled out a record 2,206 new products in supermarkets and drug stores last year. In doing so, they went against certain popular social trends.

The number of new products was 11.0% higher than the year before, according to Dancer Fitzgerald Sample's *New Product News.* The uptick was similar to 1983's 10.7% gain, but sharply under 1983's 19.4% upsurge, indicating that accelerating costs of product debuts are making marketers more cautious.

Two of the three fastest-growing categories last year bucked the physical fitness trend. Soups were the pacesetter, with a 93% runup, as Campbell Soup and Thomas J. Lipton duelled to make their products serve a wider variety of menu needs. Close behind: tobacco, up 86%, and macaroni-potatoes-rice, 83%.

As increasing health concerns drove per-capita cigarette consumption down 10% in the 1980–84 period, tobacco marketers in turn made a stronger pitch for women, who now account for nearly half of all smokers. R. J. Reynolds put designer Yves St. Laurent's logo on its new Ritz brand and Philip Morris unveiled a 120mm version of Virginia Slims.

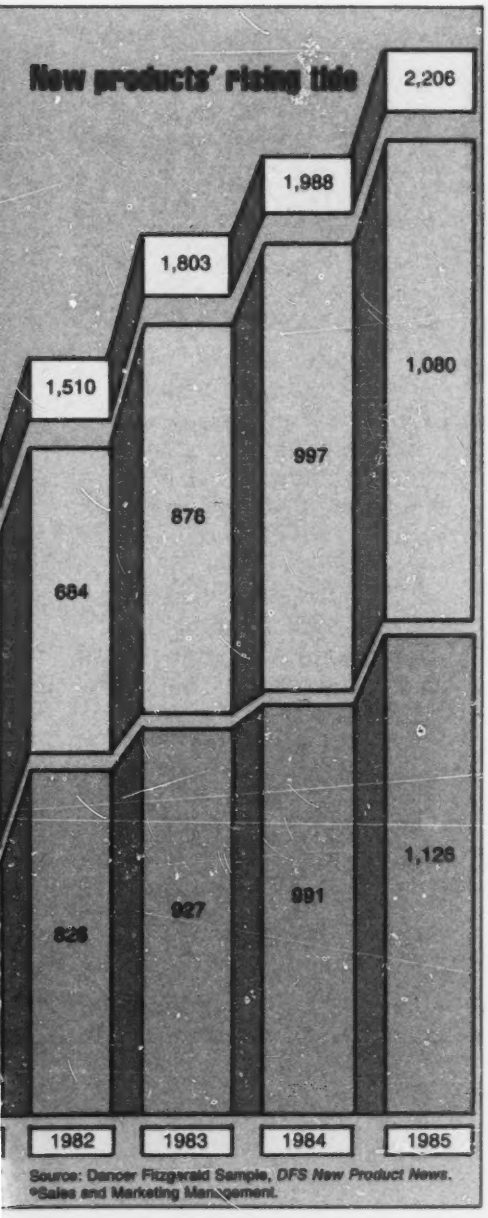
While the macaroni-potatoes-rice category doesn't seem to fit in with dietary trends, *New Product News* editor Martin J. Friedman notes that "Pasta is an in food right now. Women's magazines devote considerable editorial material to pasta recipes."

Economics may figure in, too. *The Lempert Report,* a marketing newsletter, points to the sharp increase in women who maintain families without a spouse. It notes that "with a median income of only $12,630, they often rely on 'meal stretcher' items such as pasta to make their food dollar do more."

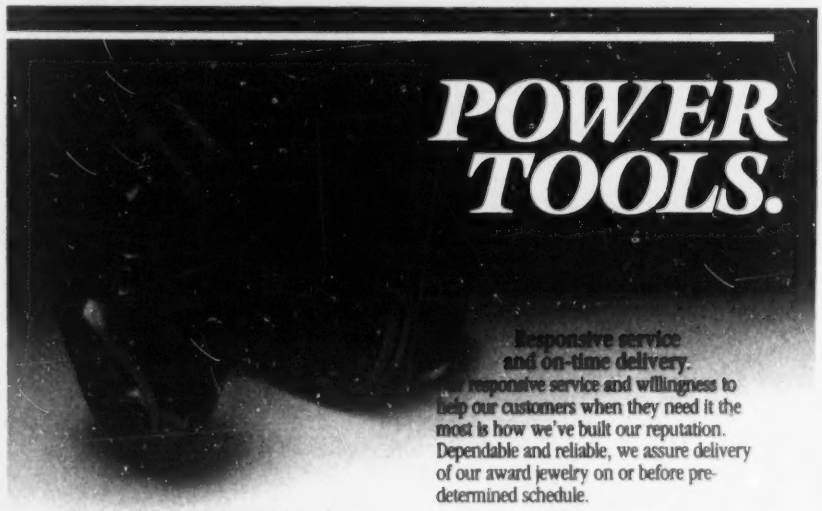
says. "We can't keep up with the demand for merchandise in the dump bins and tables."

Buikema's remodeled Naperville store is—if anything—certainly unusual. There is a live monkey on display, bath spas that bubble away, and a computer in the paint department that can deliver a perfect color match from a customer's paint chip or swatch of material.

Ace stores re-organize and prioritize in their efforts to modernize.



Source: Dancer Fitzgerald Sample, *DFS New Product News*, *Sales and Marketing Management.



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MEET THE SALES FORCE OF THE FUTURE

It will be older, decidedly more female, and more productive, says a study from the Bureau of Labor Statistics.

By THAYER C. TAYLOR
Senior Editor Management Sciences

Marketers mapping long-range sales strategies through the mid-1990s will have to reckon with a sales force whose complexion will change markedly. Mostly, marketers can expect to have more women calling on prospects and accounts. They will also benefit from healtny productivity gains by their salespeople and experience considerable difficulty in hiring younger trainees.

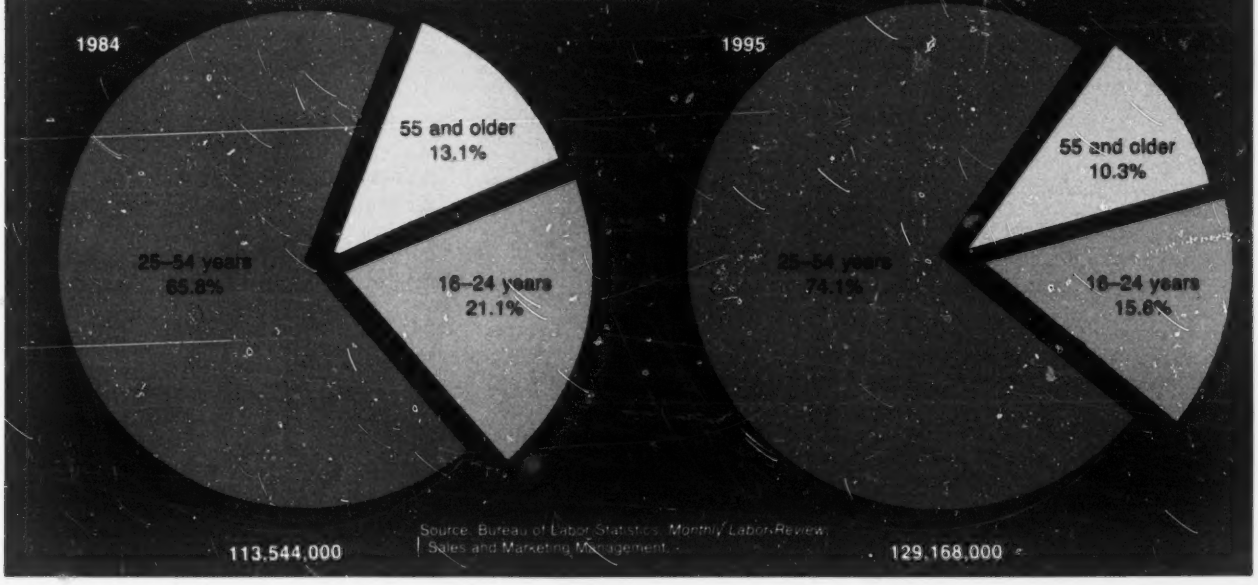
These trends will be triggered by the aging of the baby boom generation and the baby bust group that followed it. The effects of this maturation process are at the core of the federal government's new long-range projections, developed by the Bureau of Labor Statistics' Office of Economic Growth and Employment Projections (OEGEP), that cover the economy, labor force, industry, and occupations.*

While the total labor force (people with jobs plus those looking for work) will increase 15.6 million (13.8%) between 1984 and 1995, two-thirds of the newcomers will be women. Considering that "the total number of salesworkers is projected to increase a faster-than-average 20%," says John Lukasiewicz, OEGEP economist, the more rapid growth rate implies that marketers will have to hire women to a greater degree to keep their sales forces expanding.

Marketers can be encouraged by the changed age mix of tomorrow's work force. "Nearly three-fourths of the 1995 labor force will be in the prime working ages (25 to 54 years) compared with two-thirds in

**The Bureau of Labor Statistics developed three scenarios of future growth: Low trend, with an annual 2.2% growth in gross national product (GNP); moderate trend, 2.9%, and high trend, 3.5%. In the past, GNP grew 2.0% per year in the 1973–77 period, 2.6% in 1977–84.*

Labor force outlook: More experienced workers



Source: Bureau of Labor Statistics, *Monthly Labor Review*; Sales and Marketing Management

Sales force outlook: Above-average growth

Marketing & Sales Occupations (000)	1984	1995 Low Trend	1995 Moderate Trend	1995 High Trend	1984–95 % Increase Moderate Trend
Total	11,173	12,697	13,393	13,990	+20%
Retail salespersons	2,732	2,916	3,075	3,213	13
Cashiers	1,902	2,343	2,469	2,579	30
Wholesale trade salesworkers[1]	1,248	1,536	1,617	1,688	30
Stock clerks, sales floor	574	607	641	670	12
Manufacturing salesworkers[1]	**547**	**569**	**598**	**623**	**9**
Insurance salesworkers	371	384	405	422	9
Real estate agents & brokers	363	396	415	432	14
Brokers, real estate	43	48	50	52	16
Sales agents, real estate	320	348	365	380	14
Counter & rental clerks	96	93	98	101	2
Securities & financial services salesworkers	81	107	113	118	39
Travel agents	72	98	103	108	44
Real estate appraisers	38	42	45	46	19

[1]Wage and salary workers only; does not include self-employed.
Source: Bureau of Labor Statistics, *Monthly Labor Review*.
[e]Sales and Marketing Management.

Consumer market outlook: Services the spur

	1984	1995 Low Trend	1995 Moderate Trend	1995 High Trend	1984–95 % Increase Moderate Trend
Key indicators (Bil. of 1977 dollars)					
Gross national product	$2,367.3	$3,006.4	$3,240.5	$3,550.9	+37%
Disposable personal income	1,630.3	2,055.7	2,114.6	2,125.5	30
Per capita income	**$6,688**	**$7,921**	**$8,147**	**$8,190**	**18**
Personal consumption	1,522.2	1,929.2	2,053.5	2,257.9	35
Durables	237.2	299.9	320.6	363.7	35
Nondurables	572.2	659.7	702.5	763.0	23
Services	712.8	969.6	1,030.4	1,131.2	45
Households (Thous.)	84,985	102,446	102,446	102,446	21
Family	61,996	72,250	72,250	72,250	17
Nonfamily	22,989	30,196	10,196	30,196	31

Sources: Bureau of Labor Statistics, *Monthly Labor Review*; income data provided by Betty W. Su, Office of Economic Growth and Employment Projections.

Industrial sales outlook: Communications the frontrunner

Major Sectors (Bil. of 1977 dollars)	1984	1995 Low Trend	1995 Moderate Trend	1995 High Trend	1984–95 % Increase Moderate Trend
Agriculture	$ 65.9	$ 73.5	$ 80.7	$ 88.5	+23%
Mining	53.0	57.5	64.8	72.6	18
Construction	85.7	107.3	113.3	118.2	32
Manufacturing	533.9	659.3	738.6	827.4	38
Durables	324.5	426.5	472.3	532.2	46
Nondurables	209.4	242.8	266.3	295.2	27
Transporation, communications & public utilities	202.8	286.3	31.05	341.0	53
Transportation	69.5	83.6	90.6	99.0	30
Communications	75.0	134.7	145.8	160.8	94
Public Utilities	58.0	68.0	74.1	81.4	28
Trade	411.6	494.1	532.3	584.0	29
Wholesale	187.0	220.5	240.4	263.6	29
Retail	224.6	273.6	291.9	320.4	30
Finance, insurance & real estate	347.8	493.2	523.1	576.8	50
Services	315.5	430.8	461.9	503.7	46
Government enterprises	29.4	36.2	38.8	42.6	32

Source: Bureau of Labor Statistics, *Monthly Labor Review*.
[e]Sales and Marketing Management.

1984," notes Howard N. Fullerton, demographic statistician in OEGEP. In fact, prime age workers will swell 21 million while younger (16–24) and older (55 and up) workers will decline 3.7 million and 1.6 million, respectively.

For marketers, this means sales forces will be tilted more towards older and, ergo, more experienced professionals. Hence, productivity gains should slant upwards.

However, a big unknown hovers over this prospect, namely, the greater number of women who, because of their recent entrance into the sales picture, will be on the early phase of their learning curve. Their productivity gains will be influenced by the encouragement they receive in realizing their potential and the depth of their commitment to a sales career.

'SALES FORCES WILL BE TILTED MORE TOWARD OLDER, MORE EXPERIENCED PROS.'

The ascendancy of the prime working age group promises a big plus for marketers in the consumer buying area. The changed age mix means more workers will be in their peak earning years, thus lifting more consumer buying units into the upper income brackets.

To be sure, there's a cloud to the age mix's silver lining. The slippage in the 16–24 age group means a shrinking reservoir from which sales trainees are traditionally drawn. Marketers will thus face considerable pressure to raise compensation levels for new recruits, retain older salespeople for longer periods, or depend more on outright raiding.

Thus, the complexities of staffing tomorrow's sales forces may be as challenging as the strategies they'll be executing. S&MM

ter, snaps new pens into the stalls, and resumes plotting.

Impressed by how the graphs helped him increase his own sales, Sensormatic recently created the new position of retail financial analyst for DiLonardo, giving him the mission of preparing graphs for the company's 50-plus salespeople. When field sales personnel feel they are at a point in the selling cycle where a graphic presentation will help close a sale, they route their request through four regional sales managers. The vice president of marketing then ranks the requests for DiLonardo's services in order of importance.

The graphs are especially effective with the level of management Sensormatic salespeople call on, DiLonardo says. "Most of our presentations are to high-level people such as chief financial officer or executive vice president," he says. "They demand professional-looking reports, and computer graphics captures their interest."

COMPUTER HIGHLIGHT

1985: When the PC bubble burst

Despite a strong end-ot-the-year finish, when December sales of PCs in computer specialty stores surged 63% over the prior month, 1985 stands as the year when the PC bubble burst. Total unit sales for the year plunged 14% to 1,952,900, according to InfoCorp's Retail Channel Tracking Services. The Cupertino, CA, researcher polls 300 computer retailers monthly.

Apple retained its hold on first place in the face of the market share slippage from 46% to 37%. Runner-up IBM closed in on the leader, upping its share four percentage points to 29%.

A more optimistic 1985 picture is painted by Future Computing, Dallas, that says retailers moved 2,440,000 PCs, 12% more than in 1984. One reason for the spread between the two firms' totals: Future Computing's survey includes captive outlets, such as IBM product centers and Radio Shack computer stores, which are not polled by InfoCorp.

As sales slide . . .

PCs sold in computer specialty stores

1984	2,260,800
1985	1,952,900

. . . Apple's lead slims

Market share	1984	1985
Apple	46%	37%
IBM	25	29
Compaq	6	9
AT&T	*	3
All others	23	22

*Negligible.
Sources: InfoCorp, *Retail Channel Tracking Service*. [c]Sales and Marketing Management.

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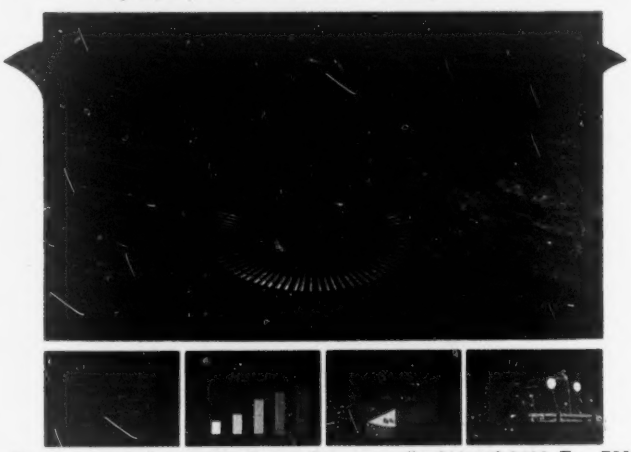

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The hi-tech marketplace's glitzy glamour and growth make it a popular sales target. But pinpointing prospects is a chancy affair because of the market's volatility and fragmentation.

But, as a result of several months of research, Corporate Technology Information Services (CorpTech), Wellesley Hills, MA, has compiled profiles of 15,000 companies in seven hi-tech sectors: advanced materials, artifical intelligence, computer hardware and software, biotechnology, robotics, and photonics (fiber optics and lasers), says Gerhard Lang, marketing vice president. He expects to have 35,000–40,000 in the database when CorpTech completes its research in more sectors: aerospace, specialty chemicals, energy, factory automation, medical, telecommunications, and subassemblies and components.

One of Lang's first sales was to Arthur Young & Co., a Big Eight accounting firm, for use by its High

Technology Group, a unit of accountants, tax specialists, and consultants that specializes in hi-tech clients. Six offices use the database and two more will join them shortly.

Doug O'Brien, manager of the firm's San Francisco branch, says, "When it comes to prospecting for new clients, it's a very useful tool for gaining a better understanding of what a local market or industry looks like. If I see there's a cluster of biotechnology companies in San Diego, I can alert people in the field."

CorpTech's Lang feels the database, besides providing sales leads, will be useful to marketers looking for joint venture candidates, new or alternative supply sources, as well as potential competitors. He stresses that "85 percent of the companies listed are private, the kind that are most difficult to find from existing information sources."

Convinced that the federal government's Standard Industrial Classification (SIC) system is inadequate for defining—let alone keep up with—hi-tech industries, he organized the database around more than 3,000 product codes. "This gives the user a sophisticated filtering capability for identifying companies by product types," he claims, "and is a better approach for reflecting the introduction of new technology."

Information can be retrieved by more than 19 different criteria, such as revenue and employment range, key executives, and parent-subsidiary relationship. The database, including four quarterly updates, is sold in the form of 17 diskettes.

Twenty companies signed up as charter subscribers. Lang will sell the database for $7,000 until he signs up 50 companies; thereafter, the price goes to $7,500.

Next year, he hopes to expand the database to include Japanese and West European companies.

Business videotex set for take-off

While consumer videotex continues to flounder as a product looking for a market, business videotex is on the launch pad for explosive growth, from $30 million in 1985 to $1.5 billion by 1990, according to a new report from Frost & Sullivan (F&S), a New York City market research firm. Setting the stage for the lift-off, says the report, "are a wide variety of pilot projects, strong activity by vendors to package videotex hardware and software, a growing number of software houses and systems integrators entering the business, and a large number of complementary computer services emerging simultaneously with business videotex."

Executive information systems will be the fastest-growing of the four segments analyzed, F&S says,

How the business videotex market will develop

Category	1985	1988 ($ Mil.)	1990
Total	**$29.7**	**$538.5**	**$1,488.9**
Executive information systems	1.8	297.9	609.5
Automated order entry	10.0	98.8	390.1
General purpose systems	*	13.0	263.0
Real estate systems	17.9	128.8	226.2

*Negligible.
Note: Details may not add to totals due to rounding.

Where automated order entry will stand this year

Industry	1986 ($ Mil.)
Automotive parts & supplies	$3.575
Drugs, drug proprietaries & druggists' supplies	2.574
Apparel, price goods & notions	2.288
Industrial machinery & equipment	1.430
Electrical appliances, radio & TV	1.144
Industrial supplies	1.001
Hardware	.858
Electronic parts & equipment	.572
Electric apparatus & equipment	.572
Metals service centers	.286

Source: Frost & Sullivan, *The Market for Business Videotex Systems in the U.S.: 1985–90.*

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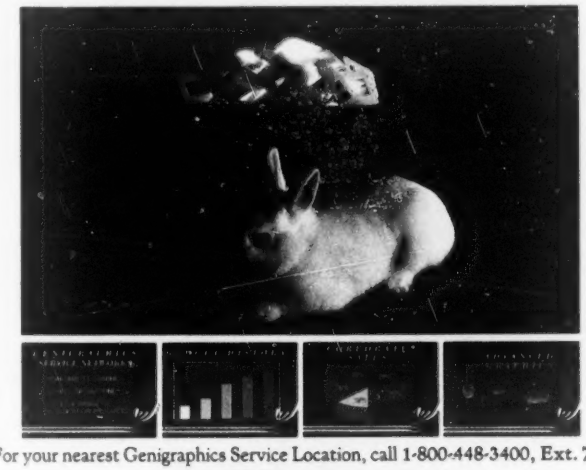

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"because they fit into existing computer systems, will be spurred by the rapid growth of PCs, offer more rapid access to information, and can be used in conjunction with analytical techniques such as graphics and statistics."

Automated order entry systems will be the second biggest segment. "Most distributors will be compelled by competitors to offer automated order entry as a service to their customers," F&S says. "Relative ease of installation" will be the second driving force.

Hi-tech researchers profiled

Howard Anderson of Yankee Group, Esther Dyson of Release 1.0, and Egil Juliussen of Future Computing are three of the researchers specializing in hi-tech industries whose quotes are an everyday staple in the likes of the *Wall Street Journal*, *USA Today*, and *New York Times*, not to mention business publications.

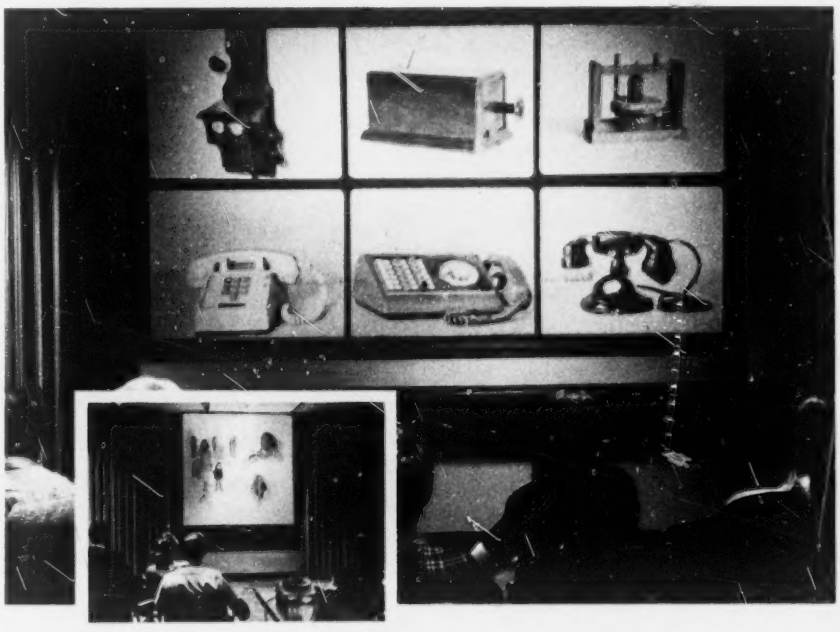
Now you can get in touch with them directly with the help of a directory of the 50 leading research companies that focus on the computer and computer-related industries compiled by Adapso: The Computer Software and Services Industry Assn., Arlington, VA. A profile of each company includes details on background, specialties, key contacts, and products or services offered, such as newsletters, directories, databases, custom research projects, and multi-client studies.

Three separate indexes help the user determine which firm best meets his marketing needs. Adapso plans to update the directory every two years, says David B. Sturtevant, communications director. A second guide on government and vertical market sources is in the works. Price of the first directory: $75.

BYTES

● A PC-based service for industrial goods marketers that links their product sales to regional market potentials, and economic forecasts is marketed by Product Forecast Management (PFM), New York City, in conjunction with Wharton Econometrics, Philadelphia. Commodity-type information on more than 500 products, from Wharton's input-output database, is used by PFM to show the marketer "where his products are being used, which industries are using them, how much is being used, and how fast usage is expected to grow," says vice president Myrna Finnerud. Subscriber receives a disk that can be used on an IBM or Compaq PC with at least 256K memory. Price: $15,000.

Audio-visual showcase



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